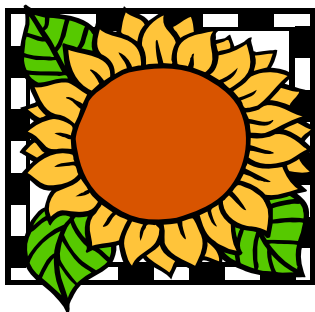


# CADDIS Connection

June 2005

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## Ad Hoc Report Training

Deloitte will offer a new three-day Ad Hoc Report training course designed for DDS and RC technology staff who need to develop customized CADDIS reports using the Actuate eDesigner Professional software. The new course replaces the original one-day class that was focused primarily on report-building for letters and basic steps for creating, modifying, saving and viewing reports. The new course will be offered in four group sessions, accommodating three participants per RC.

The new three-day format is aimed more at participants who will be CADDIS report developers, but who might not have had any exposure to Actuate. In addition to an expanded curriculum on Actuate report development, the course devotes a full day to understanding the CADDIS data mart subject areas and structures.

The intent of the course is to give participants a comprehensive introduction to ad hoc reporting by covering both the data mart and the reporting software, in addition to a full day in the lab environment creating “real-world” CADDIS reports.

Day one of the ad hoc reporting course provides an overview of key database and SQL (structured query language) concepts, an introduction to the major subject areas of the CADDIS data mart, and simple, step-by-step guidance on using this new source of CADDIS data.

Days two and three familiarize participants with the Actuate reporting environment, enabling them to produce useful reports quickly, and teaching them the fundamentals of designing and formatting reports with a high-quality, professional look and feel.

Day three of the course also introduces participants to the more advanced topics in report development that they will probably want to use as they gain experience and expertise with Actuate. These topics include parameterized reports, conditional formatting, subreports, and crosstabs.

As mentioned above, experience with Actuate is not required for the new Ad Hoc Reporting course. Familiarity with relational database concepts (tables, fields and records) and other report-development software (Crystal, Access, RPG) is strongly recommended.

## **Regional Center Report Writers Group**

The Regional Center (RC) Report Writers group was formed in April 2005 so RCs could collaborate in the creation of customized CADDIS reports (ad hoc reports). Each RC was asked to identify one lead and one backup Report Writer to join the group. The first formal meeting was held on May 25<sup>th</sup> with 14 RCs in attendance. DDS proposed a process for identifying and developing needed ad hoc reports. The process will reduce redundancies and encourage cooperation among group members.

The group will first refer to the list of CADDIS standard reports already included in the application. The list of standard reports is currently posted on the RC CADDIS Information website. The members will then identify the "Top 40" critical reports needed for each RC that are not on the list of CADDIS standard reports. Each RC will then forward its "Top 40" list to DDS, where duplicate reports will be identified. DDS will consolidate the 21 "Top 40" lists into one list for all of the RCs. Once the final, consolidated "Top 40" report list is created, the members will begin creating the reports. After all of the reports are created, the process will be repeated to address the next "Top 40" reports identified.

The Report Writers group now has members from all 21 RCs and will next meet on July 13, 2005. The members will need to complete the Ad Hoc Report training prior to the creation of these reports. DDS understands the importance of this task and will notify everyone as soon as the Ad Hoc Report training schedule is developed.

### **FAQ**

**Q.** *Will CADDIS allow for multiple sessions/screens?*

**A.** Yes, CADDIS has the capability to allow users to open multiple sessions or instances of the application on the same computer.

## **TAKING THE MYSTERY OUT OF BILLING AND SERVICE CODES**

What are CADDIS billing codes? What will happen to the service codes and sub codes we are currently using? The CADDIS team has received many questions from regional center staff anxious to understand how DDS has developed the CADDIS global code numbering system. The following should solve the mystery.

- The terminology has changed. What is commonly known as the Title XVII, Miscellaneous, and Generic “service codes” are known as “billing codes” in CADDIS.
- Billing codes are four digits instead of three, allowing for future billing code expansion. A billing code is the previous service code number plus leading zeros. For example, the previous service code for Activity Center was 505, so the CADDIS billing code is 0505.
- The subcategories of billing codes are known as service codes (sub-codes no longer exist) in CADDIS. Service codes are seven-digits; the first four digits reflect the billing code, and the last three digits are assigned in sequence for that particular billing code. For example, the service code for Activity Center – Day is 0505004 (0505 is the billing code and 004 is Day).
- Service codes have attributes that may include:
  - Dollar-based vs. unit-based service codes that permit payments to be made on a unit rate or as a dollar-based payment, thus allowing the user to authorize a maximum dollar amount per the specified frequency;
  - Payable services; i.e., services that will be paid (generic services are not paid);
  - Unit may be specified; i.e., some service codes will specify a unit; others will be more generic to allow the unit to be selected on the rate.
  - Rules for residential services are set up on the service code; i.e., the service code has indicators that tell the system to use trust money or to apply the 14-day rule when determining payment.
- Each service code will map to one, five-digit general ledger account segment. For example, the five-digit general ledger account segment for Activity Center – Day is 43020. The program segment of the general ledger account will be assigned during authorization creation based on the consumer’s population. For example, a CPP consumer will be assigned to a CPP population, and the authorization will pick up this attribute when the authorization is created. When authorizations are created for items such as Start-Up Funding not associated to a consumer, the user will select the program segment.

Users will be able to see billing and service codes in action during the upcoming CADDIS training sessions.



## Did You Know?

Did you know there is a formal process for answering your CADDIS-related questions?

RC staff should submit questions to their RC's CADDIS Contact, as s/he will be able to answer most questions directly. CADDIS Contacts should be aware of the latest updates on the project because many were involved in the design sessions and testing, some are CADDIS Steering Committee members, and all are invited to participate in the monthly CADDIS Contacts calls.

If the CADDIS Contact is not able to answer your question, s/he will submit your question to the CADDIS Q & A team via the CADDIS Project email address ([caddis@dds.ca.gov](mailto:caddis@dds.ca.gov)). In some cases, the CADDIS Contact will submit the question even if s/he knows the answer. For instance, if a question is asked frequently at your RC or if the Contact realizes the answer to a particular question would benefit other RCs, s/he will pass that question on for a formal answer. A list of CADDIS Contacts is available on the CADDIS website under the Who's Who link.

Once a question is received, the following process begins:

- The CADDIS Q & A team reviews the question and sends a receipt notification to the CADDIS Contact. The team may also request clarification of the question, if necessary.
- The question is then categorized (General, Fiscal, Consumer, Technical, etc.) and routed to the appropriate CADDIS Project team member for an answer.
- The question is answered as soon as possible (taking other workload into consideration) and routed back to the Q & A team.
- The question and answer are next routed to CADDIS Project management for review and approval.
- The approved answer is returned to the CADDIS Contact by the CADDIS Q & A team. The Contact may forward the answer to the original inquirer, and to the rest of the RC, if appropriate.
- In most cases, questions and answers are relevant to more than one RC, so they will also be posted to the CADDIS "Q & A" section of the RC CADDIS Information website.

The CADDIS Q & A team will respond as quickly as they can but, depending on the complexity of the question and research required, some responses may take up to two weeks. The team has been working diligently to answer the approximately 400 questions submitted during the CADDIS Management visits conducted late last year and early this year.

An important note: RC staff working directly with CADDIS Project staff on specific issues may continue to contact those staff members directly. They do not have to follow the process above to have their specific issue-related questions answered.

## **Testing, Testing, 1, 2, 3**

The CADDIS Project includes two comprehensive application testing phases as part of the system development effort. The purpose of testing is to identify and remedy any application-related issues that impact the system's ability to meet defined requirements. The two CADDIS Testing phases are System Testing and User Acceptance Testing (UAT).

System Testing is the phase of the CADDIS project that follows the application development phase and is intended to test end-to-end CADDIS processes across the system. The CADDIS Project Team is responsible for defining, writing and executing the "scripts", or testing scenarios, on site at DDS in Sacramento. System Testing will help confirm that the design requirements have been followed and that the integration points between the various CADDIS modules work as specified.

We are using a repetitive, or "cycle", testing approach for System Testing to test the integration between various modules multiple times to confirm consistency and accuracy of the application.

System Testing began on schedule on June 1, 2005 and is slated to continue until the 1<sup>st</sup> week in August, 2005.

User Acceptance Testing (UAT) is the second phase of CADDIS testing and is intended to test end-to-end RC business processes. UAT will be conducted on site at the two pilot RCs (Inland and Valley Mountain) starting in early August, 2005. We are currently in the midst of our UAT preparation activities and have great participation from both pilot RCs. Stay tuned for more information in future newsletters.

Please send ideas for future articles you would like to see in the CADDIS Connection to:

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